

One is Silver and the Other Gold:

Maintaining Old Strengths While Embracing Change

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Today's agenda

- Problem of dealing with electronic resources at one small university library
- Recent studies in change management
- Application of studies to real-life situation

The setting

- Trinity University
 - Approx. 2500 FTE
- 8 librarians in 2002
 - 2 Tech Services, 5 Public Services, + Director
 - All act as liaisons to academic subject areas
- 4 staff handling print subscriptions & standing orders



Providing access to electronic resources at Trinity

- OPAC
- Links to databases from library webpage
- A-Z list
- Online subject guides
- Link resolver (2004-)

The problems

- Rapidly changing environment of electronic resources
- Limited staff
- Limited time
- Our ERM = Excel spreadsheets, records in ILS, and lots and lots of emails

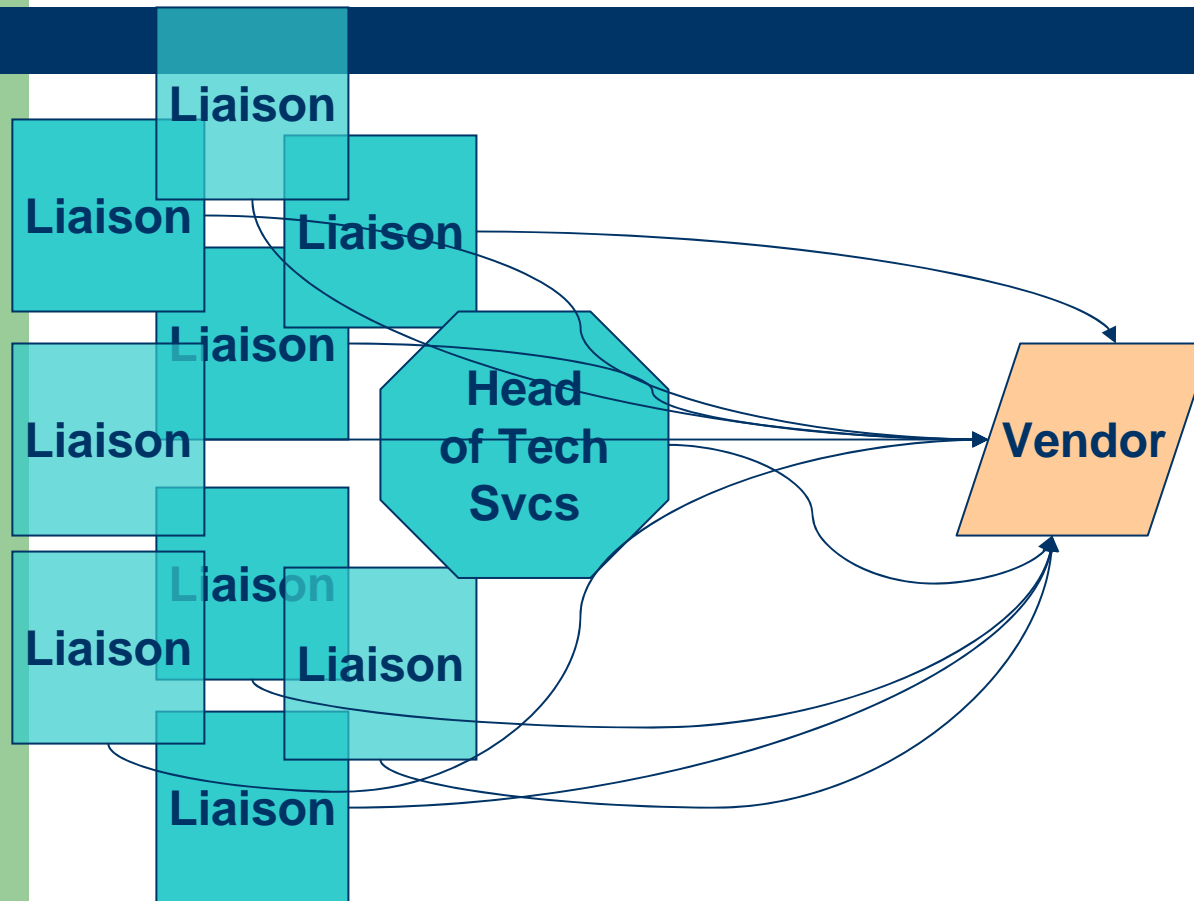
Trinity's ad hoc process: responsibilities distributed

- Librarians select resources in their subject specialties for trial, purchase, or subscription
- Contact vendors for:
 - Trials
 - Pricing
 - Licenses
 - Set-up

Trinity's ad hoc process: responsibilities concentrated

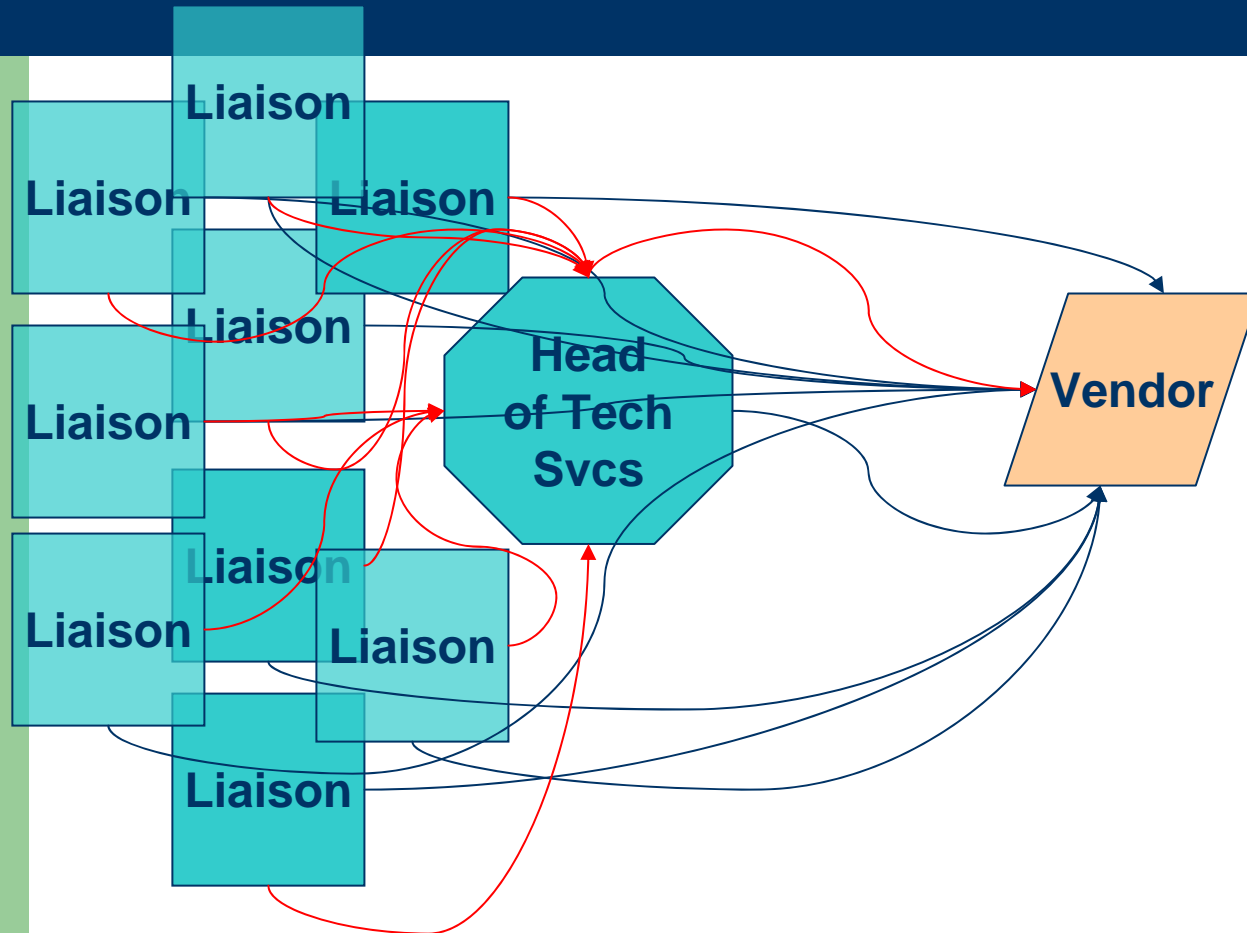
- Head of Technical Services:
 - Point of contact for vendors
 - Review & sign license agreements
 - Invoices/payment
 - Cataloging
 - Troubleshooting
 - Everything else

The distributed part: trials



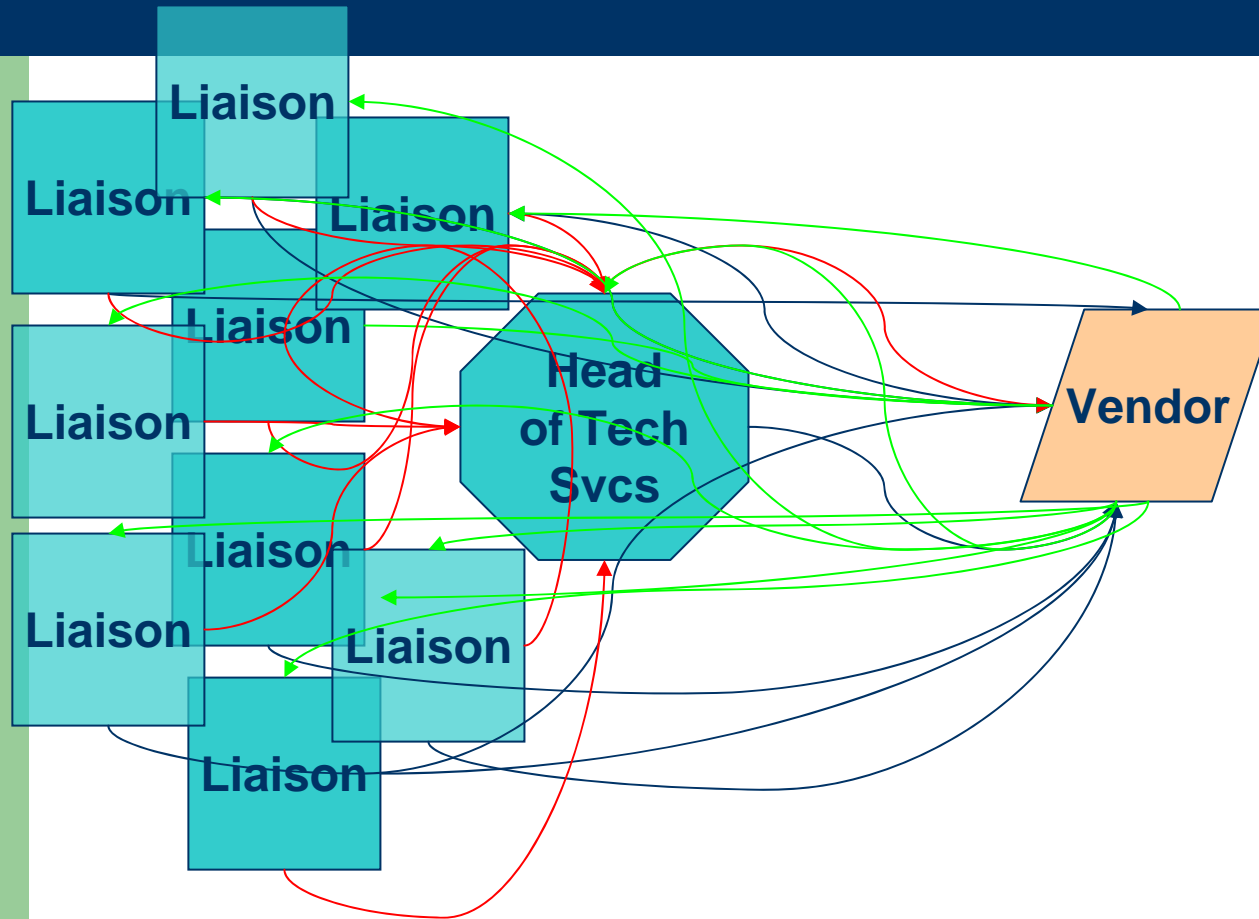
Liaison Librarians would sometimes individually contact Vendors to set up trials...

(...and tribulations)



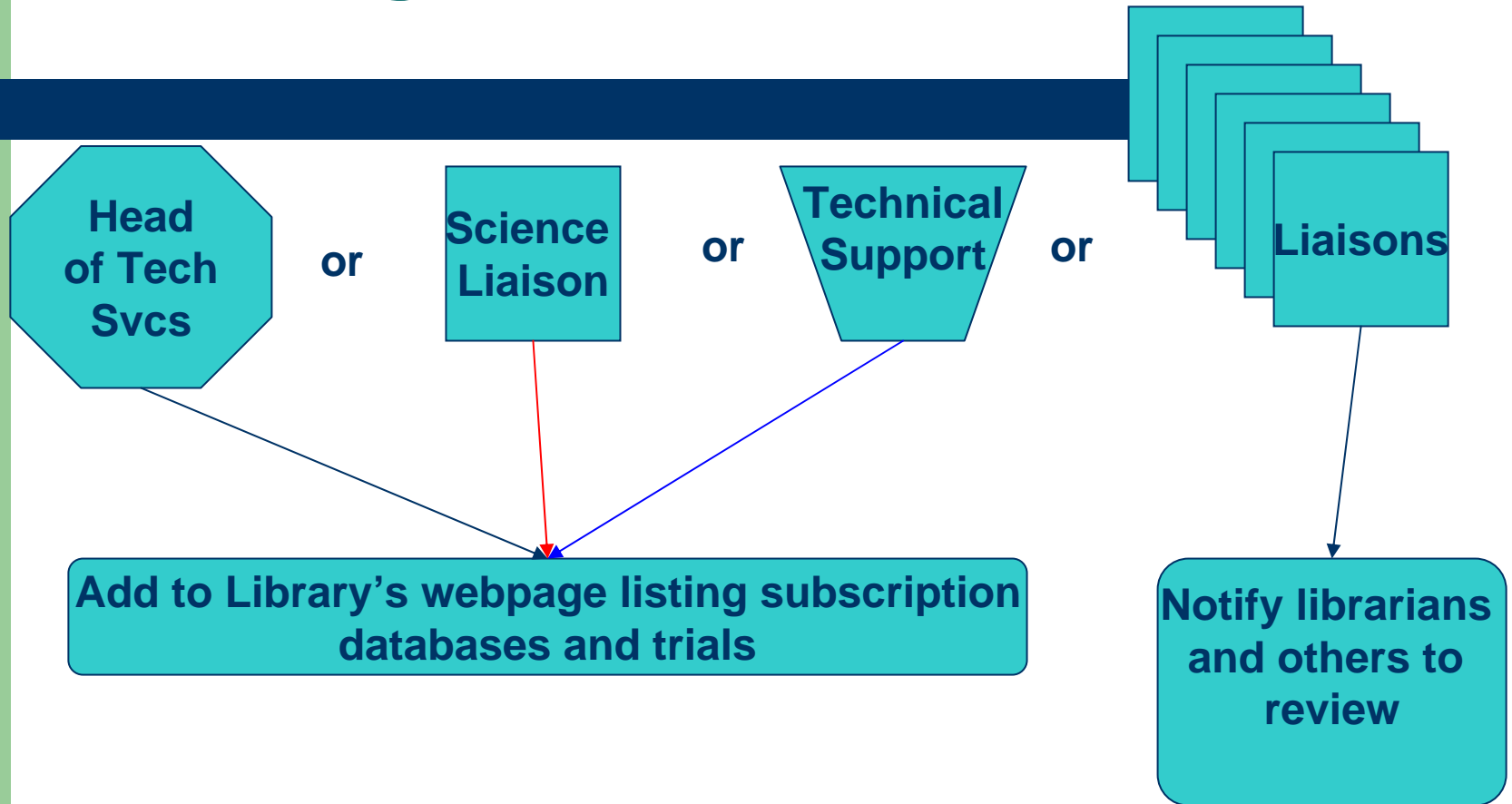
...or would contact the Tech Services Librarian, who would then contact the vendor about setting up a trial.

Spaghetti: It's not just for dinner anymore



Sometimes the vendor would need to contact the library ...but who to choose?

Providing access to a trial...



**And then managing negotiations,
pricing, licensing, etc.:**



From distributed to highly concentrated...





**Well, Superman
was busy, not
to mention
fictional.**

**So they got a
new librarian
instead.**

Settling in...

- New(-ish)/redefined position
- New “team” of staff working with subscriptions and standing orders
- Observation period

Questions asked:

- 1) What's wrong about the current system?
- 2) What's right?
- 3) How do we fix #1 without breaking #2?

1: What's wrong?

- Too many hands involved in early stages of the process = confusing
- Too few hands involved in later stages = overwhelming
- Not leveraging some staff KSA's = ineffective
- Staff fears and uncertainties about transition from print to electronic

2: What's right?

- Liaisons know products and vendors in their areas, so it often makes sense for them to be first to make contact
- Liaisons often have long-standing relationships with vendor contacts
- Having one person in charge of some major tasks makes sense some of the time
- Staff are willing, eager to learn

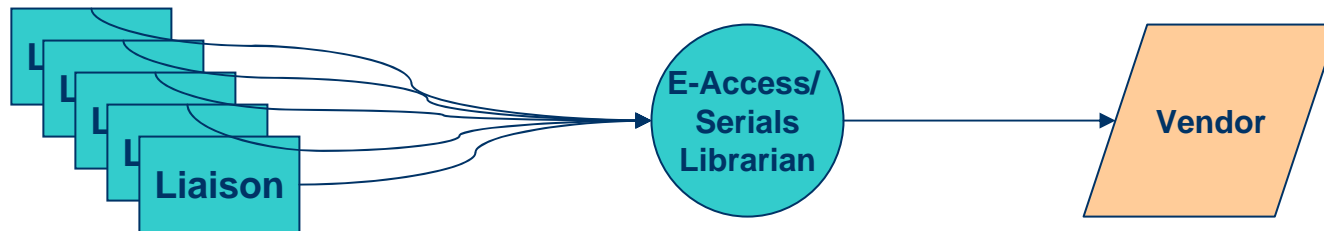
3: How to fix what's wrong without breaking what's right?

Careful Change Management...

...which didn't happen at first
in this case.

Remember the spaghetti?

- First problem: too many hands
 - Needed to be fixed quickly
 - Author didn't know anything about change management at the time



Exacerbating an existing problem...



Review and sign license
Negotiate pricing
Keep up with changes
Set up access in multiple locations
Add to A-Z list, if necessary
Usage statistics
Configure proxy server
Troubleshoot
Set up trials
Handle invoicing
Catalog resource if necessary
Handle local set-up of vendor interfaces
Marketing/promotion
Handle re-negotiations

**E-Access/
Serials
Librarian**

Balancing the workload

- Solution for all problems: Get everyone (liaison librarians AND staff) involved, but in ways that make sense

Read up!: Four approaches to change

- Directive
 - Fast, top-down, relatively simplistic – generally unsuccessful
- Master
 - Top-down, but less controlled than directive approach; recognition of greater complexity of change – often more successful, particularly over long term
- DIY
 - Linear, fairly simple; change implemented by providing “tool kit” – generally unsuccessful
- Emergent
 - Complex; loosely set direction; collaborative; change is messy – successful, often in both short- and long-term changes

Higgs & Rowland (2005)

Collaborative groups

- Advocated by Conger (2004)
 - *cf.* “emergent” approach in Higgs & Rowland (2005)
 - Recognition that change is complex and messy
 - Help individuals cope with having to learn lots of new things
 - Help organizations assimilate lots of information needed for adaptive learning
 - Arrive at consensus through collaboration

Leadership style:

Three leadership factors -- #1

- Shaping behavior
 - Focused on what leaders say and do
 - Others are made accountable for change
 - Leaders think about change
 - Focus on individual, not group

Higgs & Rowland (2005)

Leadership style:

Three leadership factors -- #2

- Framing change
 - Establish starting points
 - Design and manage change journey
 - Communicate guiding principles for change

Higgs & Rowland (2005)

Leadership style:

Three leadership factors -- 3

- Creating capacity
 - Focus on creating individual and organizational capabilities
 - Focus on communicating and creating connections

Higgs & Rowland (2005)

Leadership style:

Some conclusions

- Shaping behavior doesn't work well in most contexts
- Framing change most likely to lead to success in short-term change impacting large numbers of people in organization
- Creating capacity good for long-term change initiatives

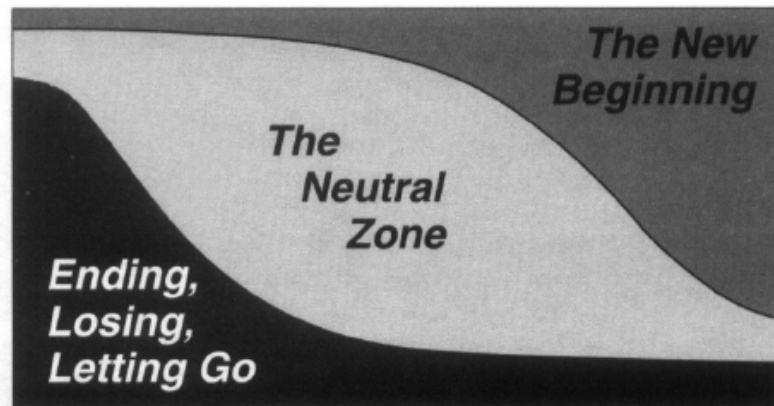
Higgs & Rowland (2005)

Know the team

- What KSA's do individuals possess already?
- How do new tasks parallel ones they already perform?
- Which styles of leadership work best with which individuals on your team?
- Who might be nervous about change, and how do you help them through the process?

The “Neutral Zone”

- “an in-between time when the old is gone but the new isn’t fully operational” (Bridges, 1991)



from Bridges (1991), p.5

Constant transition

- “We must embrace the notion that part of the job is to change the job.” (Lowry, 2005)

Support the team

- Encourage staff to grasp their own power
- Create opportunities for learning and development that may not be directly related to day-to-day work responsibilities
- Ask THEM what they want to learn how to do
- Provide time, materials, and initial guidance for brainstorming – then, hands off!

Back to what was wrong with Trinity's process...

- Too many hands involved in early stages of the process = confusing
- Too few hands involved in later stages = overwhelming
- Not leveraging some staff KSA's = ineffective

Enabling change at Trinity

- Collaborative approach
- Creating capacity (long term)
- Framing change (short term)
 - Explain where we want to go and provide guidelines
- Know my team
 - Which members work best collaboratively v. alone?
- Support my team
 - Provide tools for learning
 - Encourage learning new things (e.g. OpenURL structure, wikis, RSS)
 - Support independent problem-solving

Implementing change:

Solution 1

- Problem: Need to reduce confusion of earlier stages of e-resource process without overload
 - Recognize that liaisons are part of the team
 - Make their individual differences work to advantage

Implementing change: Solution 2

- Problem: Need to monitor accessibility of e-content
 - Explain need to staff and ask for suggestions
 - “Check on” v. “check in”
 - ILS work-arounds
 - Apply old, familiar skills to new realities

Implementing change:

Solution 3

- Problem: Need to enhance catalog records to make more user-friendly and enhance access to e-resources
 - Again, explain need to staff and encourage suggestions
 - Provide examples of other catalogs, plus basic training in OpenURL construction, etc.
 - Provide time and support for brainstorming & implementation
 - Create new workflows that draw on old KSA's while allowing for creation/incorporation of new ones

Implementing change:

Solution 4

- Problem: Increasing numbers of e-resources means increasing numbers of usage statistics, but available time doesn't increase
 - Recent cuts in numbers of titles acquired = fewer titles being bound = less work with print journals for some staff
 - Encourage staff who are interested to learn how to use Excel & help harvest statistics

What's on the horizon?

- Occasional informative meetings
- Post-conference sharing
- Create opportunities to learn
 - On-the-job training
 - Attendance at local conferences
 - Desktop learning

Steps for managing change

- Read up on change management
- Figure out which approach will work best
- Find a leadership style that will work best
- Know your team
- Support your team

Channel your inner Girl Scout

“Make new friends
But keep the old,
One is silver,
The other gold.”



(Image courtesy of genista on Flickr)

References

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